

PROCEDURE FOR JOB EVALUATION OF NEW POSTS AND RE-EVALUATION OF EXISTING POSTS

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1. PROCESS

- 1.1 The nationally agreed Agenda for Change Job Evaluation Scheme is used to determine the correct pay band for all AFC posts across the organisation.
- 1.2 The job evaluation scheme is divided into two processes:
 - job matching;
 - local job evaluation.
- 1.3 The primary method to be used for both new posts and re-banding will be job matching, whereby the job description is matched to a nationally agreed profile under the scheme. It is expected that the vast majority of posts will be banded in this way.
- 1.4 In highly exceptional circumstances where a post (new or existing) cannot be matched to a national profile, the band will be determined by evaluation of a JAQ in accordance with the terms of the scheme.
- 1.5 The scheme will be operated in a robust and transparent manner and supported by comprehensive records (paper-based and/or electronic) at each stage which may be used for effective evidencing of decisions, monitoring and audit purposes.
- 1.6 All requests for the banding of new posts must be authorised by the relevant manager and Assistant/Associate Director and must be accompanied by a banding request form with an explanation of the business need for the change in role (this information will not be made available to the panel members).
- 1.7 Banding request forms for evaluation of an existing post must include an explanation of how the post is to function in a significantly different way from when it was previously evaluated due to changes in service provision. The remit of the post should have changed to such an extent that there is a requirement for the post holder to demonstrate a change e.g. in level of responsibility, associated knowledge and skill, not simply an increase in workload. In every circumstance, it is the post that is matched or evaluated **not** the individual who happens to be in the post at the time.
- 1.8 Job descriptions and Job Specifications must be on the Trust template (Appendix 2), available on the intranet, and written to accurately reflect the needs of the post within the service and not the knowledge, skills, personal attributes or work preferences of the post holder. Phrases copied directly from the Job Evaluation Handbook will not be considered by the Panel unless supported by evidence of the particular requirements of the post in question (e.g. “implements policies which impact beyond own area” requires an explanation of which policies, which areas they impact upon and in what way).

- 1.9 Posts will be evaluated objectively using methods approved by the Job Evaluation Scheme and using all relevant post-specific information contained within the job description and Job Specification documents.
- 1.10 Documentation considered to be unfit for purpose at any stage of the process will be returned to the line manager, leading to a delay in the processing of the request.
- 1.11 Wherever possible the name(s) of the post holder(s) will not be made known to the panel members. The names of the panel members will not be made known to the post holder(s) or the line manager.
- 1.12 Advice and guidance on drawing up Job Descriptions and Job Specifications is available in Appendix 1. Additional support is available from the Resourcing Team.

2. PREPARATION

2.1 An Agreed Job Description/Job Specification

The Job Matching procedure is based on an agreed and up-to-date Job Description/Job Specification (JD/JS) for the job under review. Therefore, it is extremely important the Line Manager and the individual Job Holder(s) agree that the content of the JD/JS accurately reflects the job as this will enable the job to be properly assessed.

2.2 Signing Off

When the Line Manager and the Job Holder(s) are satisfied that the JD/JS is accurate and have agreed and completed the Job Evaluation Effort Form (**Appendix 4**), then the Line Manager will compile a Job Evaluation Matching Pack containing the following documents:

- The Job Evaluation Application Form (**Appendix 5 or 6**);
- The agreed Job Description/Job Specification;
- The Job Evaluation Effort Form (**Appendix 4**);

2.3 Disagreements

Where the Line Manager and Job Holder(s) fail to agree on the accuracy of the job description/Job Specification and are unable to “sign-off” the document then the matter should be referred to the next manager in line, in consultation with a HR Representative, for a final decision. The Job Matching Procedure will not commence until the final decision had been made.

3. PROCEDURE FOR THE MATCHING OF NEW POSTS (Those with no existing post holder/s)

- 3.1 A new job is a role that has either not previously been undertaken within the Trust or is an existing role that has been changed considerably following the resignation of a previous holder.
- 3.2 Before a new post can be advertised it should be submitted for job matching against a national profile in order that a pay band can be determined for recruitment purposes.
- 3.3 In exceptional circumstances, and subject to the authorisation by the Chief People Officer, if posts require advertising, prior to the manager receiving the matching outcome, or when an indicative pay band is established, the post must be advertised with the pay band subject to full evaluation. It should be born in mind by managers that this is only an indicative outcome and that there is a possibility of a lower/higher outcome at full evaluation.
- 3.5 Prior to any post being submitted for job matching it must be approved by the Establishment Control Panel. Following approval, applications for job matching of new posts should be submitted to the AfC Team using the Application for Matching of a New Post (**Appendix 5**) accompanied by an up to date job description and Job Specification, signed by the Manager.
- 3.6 The AfC Team will contact the Manager to schedule the new post for a Job Matching Panel, normally within **30** working days of receipt of the application. If there are any unforeseen delays the AfC Team will notify the Manager.
- 3.7 The Manager must be available by telephone to answer any questions which may arise during job matching.
- 3.8 The matching process will follow the Matching Procedure detailed in the NHS Job Evaluation Handbook. The factor levels agreed by the Panel on a factor by factor basis are entered into the computerised system for evaluation, scoring, and weighting.

The outcome of this stage is either:

- i) All factor levels are within the range specified on the profile, this a Profile Match

OR

- ii) Most factor levels match but there are a small number of variations, this is a Band Match.

OR

- iii) The factor levels do not match a national profile, this is a No Match.
- 3.9 The outcome will be referred to the Consistency Panel for checking and advice given accordingly.
- 3.10 After the outcome has been cleared through consistency checking by the Consistency Panel, the AfC Team will communicate the outcome to the Manager who will receive a copy of the matched job report and the national profile, together with a returned copy of the job description and Job Specification. Copies will also be filed with the panel papers.
- 3.11 A reasonable period of time, eg 12 months, will be allowed for the job to 'bed down' and this may vary according to the nature of the job. Once the full demands of the job are clear, the manager should resubmit the revised job description and Job Specification so it can be reassessed using the re-evaluation of an existing post process (Section 4).

4. PROCEDURE FOR RE-MATCHING OF EXISTING POSTS

- 4.1 It may be appropriate to carry out a re-matching where there has been a **significant** change in the job resulting in increased job complexity; increased responsibilities; organisational/department change or even a reduction in job content. (It should be noted that an increase in volume of work does not justify a re-evaluation.)
- 4.2 When organisational change necessitates a post holder to take on additional responsibilities and there are already comparable jobs in the organisation, it will be possible to give the post holder that matching outcome; however, that must be signed off the Agenda for Change leads (management and staffside) and also put to the Vacancy Scrutiny/Establishment Control Panel. If approved there will not be a need for this post to be submitted for full job matching.
- 4.3 When there is a temporary change of role to cover an existing post at a higher band ie to fill a post on a temporary basis when a vacancy is unfilled, but being advertised, or the post is being held open for someone who is due to return eg from long term sick leave, maternity leave, this should be dealt with in accordance with Paragraphs 6.32 – 6.34 of the [NHS Terms and Conditions of Service Handbook](#).
- 4.4 Prior to any post being submitted for re-matching it must be approved by the Establishment Control Panel. Following approval applications for re-matching should be submitted to the AfC Team using the Application for Re-Matching of an Existing Post form (**Appendix 6**) which should be completed and accompanied by an up to date job description and Job Specification, signed by the post holder, Line Manager and the relevant Director/Associate

Director/Head of Service. For senior posts (i.e. those above Band 8a), the application should be submitted to the Chief People Officer.

- 4.5 Any application for evaluation must include an effective date. In the case of a request for re-evaluation it is expected that the effective date of change should be within six months of the date of submission of the request.
- 4.6 The AfC Team will be responsible for scheduling the post for a Job Matching Panel, normally with 30 working days of the application. If there are any unforeseen delays the AfC Team will notify the post holder and the Manager.
- 4.7 Both the post holder and the Manager must be available by telephone to answer any questions which may arise during job matching.
- 4.8 The matching process will follow the Matching Procedure detailed in the NHS Job Evaluation Handbook. The factor levels agreed by the Panel on a factor by factor basis are entered onto the computerised system for evaluation, scoring and weighting. The outcome of this stage is either:
- i) All factor levels are within the range specified on the profile, this is a Profile Match.
- OR
- ii) Most factor levels match but there are a small number of variations, this is a Band Match.
- OR
- iii) The factor levels do not match a national profile, this is a No Match.
- 4.9 After the outcome has been cleared through consistency checking by the Consistency Panel the AfC Team will send a letter communicating the outcome to the Manager, copied to the post holder. Attached will be a copy of the matched job report, and the national profile, together with a returned copy of the job description and Job Specification. The Manager will be responsible for ensuring that a copy is filed on the post holder's personal file. A copy will also be filed with the panel papers.
- 4.10 If the job match results in a lower band for the current holder, pay will be protected in accordance with Section 3: Protection of Pay & Conditions of Service of the Organisational Change Policy (H29), whilst TSDHCT staff TUPE'd in from NHS Devon will retain their own protection arrangements.
- 4.11 The Manager is responsible for completing a change of circumstances form, where appropriate, quoting the AfC job reference number.

- 4.12 If the post is not able to be matched the Consistency Panel will either:
- i) refer back to the Manager for additional information/completion of hybrid job analysis questionnaire*
- OR
- ii) refer the job back to another panel
- OR
- iii) refer the job for a full job evaluation as detailed in Section 5.0.

5. PROCEDURE FOR FULL JOB EVALUATION OF EXISTING POSTS

- 5.1 With reference to 4.12 iii) above, within 14 days of the Consistency Panel meeting, the AfC Team will send a letter to the post holder, copied to the Manager requesting the post holder to complete a Job Analysis Questionnaire (JAQ). The completed JAQ must be typed and must be signed by the post holder and Manager, submitted electronically to the AfC Team within 30 working days.
- 5.2 On receipt of the completed JAQ the AfC Team will arrange for the post holder to meet with two job analysts, a management representative and a staff side representative. This is a supportive process to ensure that the JAQ has been completed clearly and all relevant information has been included.
- 5.3 Amendments agreed at the analyst meeting will be incorporated into the JAQ and sent electronically to the post holder and Manager for approval. When the amendments have been agreed and confirmed in writing/email by the post holder and Manager the AfC Team will schedule the JAQ for the Job Evaluation Panel within 30 working days of the amended JAQ being agreed.
- 5.4 The evaluation process will follow the National Protocol for Local Evaluation detailed in the NHS Job Evaluation Handbook. The outcome of this stage is a factor by factor evaluation of the job, together with a total weighted score. The computerised JAQ is the complete record of the process.

5.5 The outcome is referred to the Consistency Panel for ~~Consistency~~ ~~Checking~~ ~~Devon~~ the Consistency Panel identifies any inconsistencies with the outcome the Panel will either:

i) refer back to the Manager for additional information

OR

ii) refer the job back to another panel

5.6 After the evaluation has been cleared through the Consistency Panel the AfC Team will send a letter communicating the outcome to the Manager, copied to the post holder. Attached will be a copy of the evaluated job report and summary together with a returned copy of the JAQ. The Manager will be responsible for ensuring that a copy is filed on the post holder's personal file. A copy will also be filed with the panel papers.

5.7 If the job evaluation results in a lower band for the current post holder, pay will be protected in accordance with Section 3: Protection of Pay & Conditions of Service of the Organisational Change Policy (H29), whilst TSDHCT staff TUPEd in from NHS Devon will retain their own protection arrangements.

5.8 The Manager is responsible for completing a change of circumstances form, where appropriate, quoting the job reference number, effective date of change.

6. REQUESTS FOR REVIEW OF JOB MATCH/JOB EVALUATION RESULTS

6.1 A review can be requested where the post holder disagrees with the outcome of the job match/evaluation and can provide further information in support of their request for review.

6.2 An informal review can be requested to exchange information in an informal manner to help clarify issues and provide an opportunity for discussion and resolution.

6.3 The informal stage normally consists of a meeting between the employee requesting a review and a nominated person from each side, for example, an HR adviser and a staff side representative, both of whom are trained matching or evaluation panel members and able to explain the job evaluation scheme and local procedures for matching or evaluation.

6.4 If requested by an employee, the employee's own staff side organisation representative and/or the line manager can be present.

- 6.5 Possible outcomes from an informal stage are:
- a. The employee withdraws their review request because they now understand and accept the original outcome. There must however be no pressure on employees to withdraw review requests, even if they appear to other attendees to be unfounded.
 - b. The employee better understands what information will be required by the panel in order to consider the review request.
 - c. The employee is better able to focus on those factors which are relevant to a review in their particular circumstances.
- 6.6 Where a formal review is necessary the post holder who wishes to query the result of a job match or job evaluation outcome may do so by completing for a Band Outcome Appeal Form (Appendix 7). This must be signed off by the post holder and the appropriate level of line management as indicated in the table in Appendix 8 prior to forwarding to the AfC team.
- 6.7 The post holder(s) must provide details of where they disagree with the job match/evaluation and include any additional information. The manager/post holder must reach agreement on the content of the additional information prior to being forwarded to the Agenda for Change Team. The completed Band Assignment Review Form and additional information must be signed and dated by the post holder and the Manager and sent to the AfC Team within 12 weeks of the date of the letter giving the result of the job match/evaluation.
- 6.8 The AfC Team will arrange for a Review Panel to meet within 30 working days of receipt of the application.
- 6.9 Both the post holder and the Manager need to be available by telephone to answer questions which may arise during the Review Panel meeting.
- 6.10 The review process will follow the procedure detailed in the NHS Job Evaluation Handbook (Section 11 – Matching Procedure, Paragraph 7). The Review Panel operates in the same way as the Job Matching Panel, factor levels agreed by the panel on a factor by factor basis are entered into the computerised system for evaluation, scoring and weighting. The outcome of the Review Panel will be either:
- i) confirmation of the same match;
- OR
- ii) confirmation of a match to a different profile;
- OR
- iii) confirmation of an evaluation resulting in a different band;
- OR
- iv) confirmation of a no match

- 6.11 The outcome will be referred for consistency checking through the Consistency Panel. With 14 working days after it has been cleared the AfC Team will send a letter communicating the outcome to the post holder, copied to the Manager.
- i) When the outcome is that the original match is sound the letter will include the relevant job matching report. The Manager is responsible for ensuring that a copy is filed on the post holder's personal file.
 - ii) When the outcome is a match to a different profile, attached will be a copy of the matched job report and profile/evaluation report together with a returned copy of the review documents submitted. The Manager is responsible for ensuring that a copy is filed on the post holder's personal file. A copy will be filed with the panel papers.
- 6.12 The post holder has no right of appeal beyond the Review Panel if the complaint is about the matching outcome.

7. JOB MATCHING/EVALUATION COMPLAINTS PROCEDURE

- 7.1 In the event that the post holder can demonstrate that the process was misapplied they may lodge a complaint. The complaint must be against the process, not against the matching result or pay band.
- 7.2 A complaint must be made in writing **within 30 days** of receipt of the written banding decision and forwarded to AfC Team, Human Resources Department, Hengrave House, Torbay Hospital. The complaint document must contain:
- Details of where the post holder(s) feel that the Matching or Evaluation process was misapplied **and** evidence to support the case;
 - or**
 - Details of why the post holder(s) is/are unhappy with the local application of the national agreement **and** evidence to support the case.
- 7.2 Receipt of the complaint will be acknowledged in writing and a Panel will be convened as soon as practicable and within 2 months of receipt of the complaint documentation.
- 7.3 The Panel will consist of:
- Assistant/Associate Director (or nominee)
 - Agenda for Change Management Lead (or nominee)
 - Agenda for Change Staffside Lead (or nominee)
- 7.4 No member of the Panel will have been involved in the banding process as a Panel member.

- 7.5 The Panel hearing will be attended by both the post holder and their line manager. The post holder has the right to be accompanied by an accredited trade union representative or work colleague employed by the Trust. If the complaint is a collective one affecting several staff, two post holders should be chosen to represent the views of all.
- 7.6 The decision of the Panel will be confirmed in writing to the post holder(s) and their line manager.
- 7.7 The decision of the Panel is final and concludes the complaints procedure.

APPENDIX 1

GUIDANCE ON DRAWING UP JOB DESCRIPTIONS AND JOB SPECIFICATIONS**INTRODUCTION**

The Job Description/Job Specification plays an essential part in the Job Matching/Evaluation process. Therefore, it is important the Job Description/Job Specification is up-to-date and accurately reflects the job to be reviewed during the Matching/Evaluation process.

This guidance provides advice on what should and should not be included in a Job Description, particularly with reference to avoiding indirectly discriminatory practice and promoting diversity.

Having up-to-date and agreed Job Descriptions is good HR practice and their main purpose is to ensure that employees and their line managers have a common understanding of what is required of the jobholder. The required information is generally set out in the form of a list of job duties. Similarly, having Person Specifications available for all jobs is also good HR practice, because it facilitates the recruitment process.

Up-to-date and agreed Job Descriptions/Job Specifications are required to facilitate Job Matching and make the matching procedure accurate and efficient.

Job Descriptions should not follow the National Job Profile format as profiles are not job descriptions and do not fulfil the main purpose of having job descriptions.

Job Descriptions submitted for Job Matching should not contain any indication of the expected pay band.

Information required for Job Matching, which is not usually included in a Job Description or Job Specifications (e.g. in relation to the physical effort or working conditions) will be collected by the completion of the short questionnaire contained in Appendix 4 and, if necessary, through oral evidence.

GENERAL ADVICE

Try and make sure the language used in the Job Description/Job Specification is plain English and that technical words are used only when necessary and when referring to specialist equipment/treatment, techniques, etc. For example, *“prepares pharmaceutical products using laminar flow equipment”*.

Use verbs that specify, objectively, the responsibilities of the Job Holder. For example, instead of the phrase *“Responsible for processing invoices”* state *“Prepare invoices for authorisation and payment by [doing what]”*.

Avoid using words that may undervalue a task, such as *“only”*, *“routine”*, or *“just”*. Instead use active verbs such as ...

Achieves	Contributes	Gives	Performs	Stores
Acts	Contacts	Helps	Plans	Specifies
Acquires	Controls	Hires	Prepares	Studies
Advises	Costs	Implements	Presents	Submits
Allocates	Counsels	Improves	Prices	Supplies
Analyses	Decides	Informs	Produces	Teaches
Appraises	Delegates	Interviews	Promotes	Telephones
Approves	Designs	Issues	Provides	Tests
Ascertains	Develops	Learns	Quantifies	Trains
Assesses	Directs	Maintains	Receives	Tutors
Authorises	Encourages	Manages	Recommends	Updates
Budgets	Ensures	Maximises	Reports to	Validates
Calculates	Establishes	Meets	Represents	Verifies
Circulates	Estimates	Monitors	Retains	Visits
Coaches	Evaluates	Negotiates	Reviews	
Completes	Examines	Organises	Selects	
Conducts	Finds out	Oversees	Serves	
Consults	Forecasts	Participates in	Services	

Other Job Holders should be referred to by their Job Title, e.g. Director of Finance.

The JD/PS must not contain potentially prejudicial information such as hours of work, the current or proposed pay band, gender, ethnic origin, etc.

ORGANISATIONAL STRUCTURE

The Job Description should include a simple Organisation Chart that clearly shows the job and where it sits in the organisational structure of the service/department/ward concerned.

Using job titles only the Organisation Chart must show the job (i.e. to be appointed to/evaluated) as well as the jobs immediately above and below this job (where possible, the two levels in the structure immediately above and below).

Summary

The Job Description must be ...

Clear Uses plain English, no unexplained abbreviations/acronyms, no unnecessary jargon, no gender specific items.

Concise Provides a brief summary of the main duties and responsibilities.

Correct Is an accurate reflection of the all the duties of the job.

Consistent Uses the Trust's JD template (see Appendix 2) and fits in with skills and experience detailed in the Job Specification.

DEVELOPING THE JOB/PERSON SPECIFICATION

The specification describes the qualifications, experience and skills required to undertake the duties and responsibilities outlined in the Job Description and supports the recruitment process when appointing to the job. Writing the Job Specification requires the same use of plain English and avoidance of jargon as with the Job Description and should emphasise the knowledge, experience and skills that are actually required to undertake the role. Below are examples of the types of attributes that are typically included within the Specification.

Qualifications, Knowledge and Experience

- What is the minimum qualification(s) that is essential for appointment to the job? (The Person Specification may state that the undertaking of a qualification is expected on successful appointment, however in all cases the Job Specification should indicate the qualifications, knowledge and experience required for someone fully competent in the post, not just at recruitment).
- Where individuals could gain the necessary knowledge associated with the minimum qualification(s) through a combination of in-depth experience and/or theoretical study/training then describe the experience and/or study/training required as an alternative to the minimum qualification(s).
- Are there any legal/statutory requirements that are necessary for appointment to the job (e.g. State Registration)?
- Experience required as essential for appointment to the job should be listed and described with reference to the duties and responsibilities set out in the Job Description. For example, if the Job Description states that the Job Holder has a responsibility for staff supervision then the Specification may describe the relevant experience required as ... *“Experience of allocating and assessing the work of a team of 1-5 people”*.

Skills and Abilities

What skills and abilities will the Job Holder need to undertake the job effectively?

- Communication skills – e.g. the ability to establish and maintain effective relationships and gain the co-operation of others, motivational skills, negotiation skills, presentation skills, training counselling skills? Will the post holder need to communicate with patient/service users that will have communication or sensory difficulties?
- Analytical skills – e.g. to diagnose a problem or illness and understand complex situations or information, this could include clinical, technological, statistical or financial information.
- Judgemental skills – e.g. to formulate solutions and recommend/decide on the best course of action/treatment.
- Planning and organisational skills – e.g. if necessary describe the complexity and degree of uncertainty involved in these activities.

- Physical skills – e.g. standard or advanced keyboard skills.

Assessment

The Specification must also identify how the identified criteria will be measured, including the method of assessment, as follows:

Essential requirements These are minimum criteria which the individual must possess to be appointed to the job.

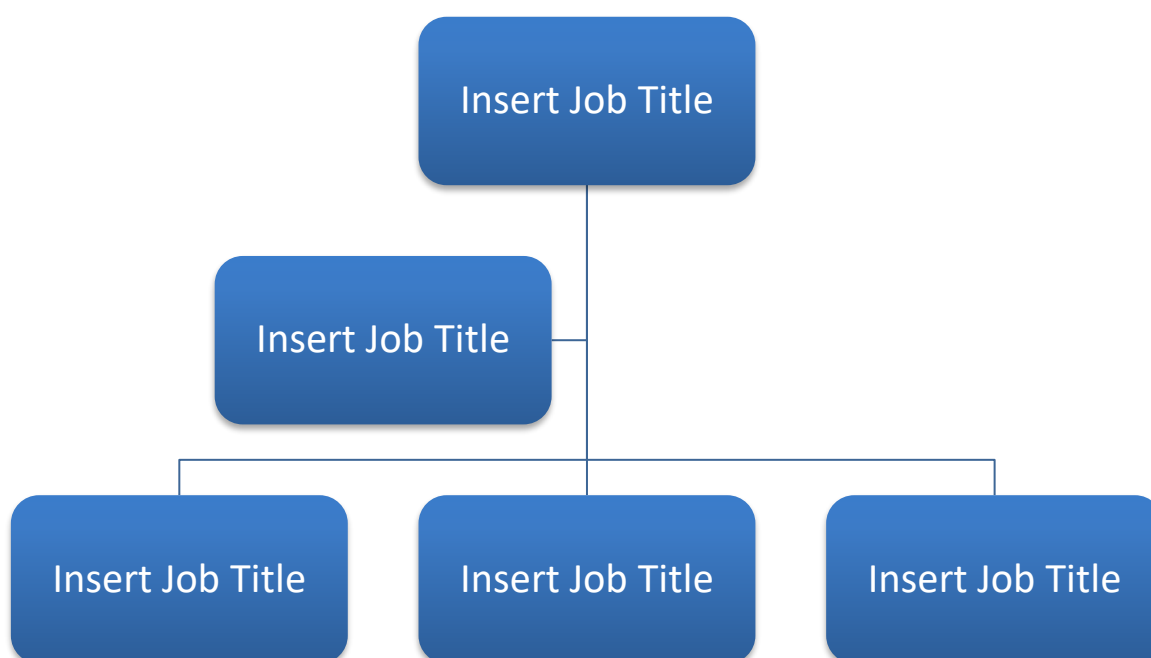
Desirable requirements These are criteria which are useful to the role and may be used to choose between candidates who meet all the essential criteria.

Method of Assessment
Application Form
Test
Presentation
Interview

JOB DESCRIPTION

Job Title:	
Band/Pay:	
Department:	

Insert title of organisation e.g. People Directorate



Job overview

Insert brief description in a sentence or two, to summarise the role.

Main duties of the job

Insert what the person will do.

About your new team and department

Insert information about the team/work ethic/rewarding or any key information.

Detailed job description and responsibilities

We recommend bullet points and cover areas such as:

Communication and working relationships

- *This section details the main working relationships and communication channels linked to the post.*
 - *Who does the post holder communicate with?*
 - *What sort of environment will the post holder communicate in?*
 - *What information is communicated?*
 - *What method(s) of communication are used?*
 - *Are any IT/technical communication skills needed?*
- ***Please include for managers:***
- *To ensure that patients/carers/service users/the public are involved in decision making processes where services or access to services is reviewed or changed, making appropriate time and resources available.*
- *To involve patients/carers/services users/the public in interview and recruitment processes where their knowledge can inform the decision-making processes.*

Planning and organisation

- *Does the job holder organise ongoing activities or programmes eg arrange meetings?*
- *Is the Job Holder required to adjust and formulate plans/strategies?*
- *Does the job holder formulate long term strategic plans?*

Analytical and judgement

- *Is the Job Holder required to formulate solutions and decide on the best course of action?*
- *Do these judgements require analysis or comparison of a range of options?*
- *Is the Job Holder required to diagnose a medical condition or problem?*

Responsibility and accountability

- *To what extent is the job holder required to be accountable for their own actions and those of others, to use initiative and act independently, and the discretion given to the jobholder to take action?*

Responsibility for patients and client care

- *What contact does the Job Holder have with patients/clients/service users and what is the nature/frequency of the contact?*
- *Is the Job Holder responsible for providing care and, if so, what is the nature of the care provided?*
- *Does the Job Holder have a responsibility for designing and/or implementing care programmes and, if so, does this involve other health care professions/disciplines?*
- *How does the Job Holder deliver care to the patient, e.g. in-patient setting, in a clinic, in the home, over the telephone?*
- *Does the Job Holder formulate and adjust diagnosis protocols or treatment plans and medication?*
- *Does the Job Holder have to work to and follow defined protocols/procedures? Does the Job Holder have any involvement in the development and writing of such protocols/procedures?*
- *Does the Job Holder have a lead role/responsibility for any aspects of patient care?*

Policy and service responsibility

- *Does the Job Holder have any responsibility for the development and implementation of policy and/or services?*
- *Does the Job Holder only implement changes to established working practices or procedures?*
- *Does the Job Holder have any responsibility or involvement for the development of policy and/or services?*
- *Is the Job Holder's responsibility limited to her/his own work area or does their responsibility have a wider impact?*
- *Does the Job Holder have responsibilities across more than one service/department/function?*
- *Does the Job Holder's responsibility/involvement in policy development or service development impact on their direct working area or across the organisation?*
- *Does the Job Holder represent the team/department/organisation on any long-term planning or developmental groups?*
- *Does the post holder undertake medium or long-term planning as a key duty?*

- Does the post holder represent the team/department/organisation in long-term planning or development groups?

Responsibility for finance, equipment and other resources

- Does the Job Holder handle cash/cheques/patients' valuables?
- Does the Job Holder authorise payments to internal/external suppliers?
- Is the Job Holder responsible for the security of goods/equipment?
- Is the Job Holder responsible for stock control and is s/he an authorised signatory?
- Does the Job Holder have any responsibility for equipment?
- What responsibility does the Job Holder have for budgets (e.g. monitoring, budget setting, budget holder)?

Responsibility for supervision, leadership and management

- Does the post holder manage, supervise and/or train staff?
- What types of staff are managed or supervised and how many?
- What responsibility does the Job Holder have for on-going staff development?
- Does the Job Holder have any responsibility for new/junior staff or students?
- Does the Job Holder have any responsibility for educational/teaching sessions?

Information technology and administrative duties

- Does the Job Holder have specific responsibility for information resource eg computerised or paper based?
- Does the Job Holder have responsibility for information systems eg hardware, software medical records?
- What type of systems is the Job Holder responsible for?
- Do they share the responsibility with others?
- Is this a major job responsibility?
Does the Job Holder take and transcribe formal minutes

Responsibility for research and development

- Does the Job Holder have responsibility for R&D programmes or activities?
- Is it a major job requirement?
- Is the Job Holder required to use research methodology to undertake audits?

PERSON SPECIFICATION

Attributes	Essential	Desirable
Qualifications and training	<i>Minimum requirements</i>	<i>Any preferable requirements which could be obtained once in post</i>
Knowledge and experience	<i>Please note you cannot use length of years' experience as it could be deemed as discriminatory. Use wording eg Proven relevant exp</i>	
Specific Skills		
Requirements due to work environment/ conditions		
Physical skills		
Physical effort		
Emotional effort		
Mental effort		

JOB EVALUATION EFFORT FORM

Job Title:		
Physical Effort:		
Is the Job Holder expected to perform tasks of a physical nature ¹ ?		<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	<input type="checkbox"/> Several periods every shift	
	<input type="checkbox"/> Frequently – on average at least every other shift	
	<input type="checkbox"/> Occasionally – less than every other shift but at least three times per month	
For how long?	<input type="checkbox"/> Less than 20 minutes on each occasion	
	<input type="checkbox"/> Greater than 20 minutes on each occasion	
When lifting/moving, are mechanical aids provided?		<input type="checkbox"/> Yes <input type="checkbox"/> No
How Often?	If lifting, pushing or pulling is involved what is the maximum weight involved ¹ ?	
Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>	<input type="checkbox"/> Less than 5 kilos <input type="checkbox"/> 6-15 kilos <input type="checkbox"/> Greater than 15 kilos	
Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>	<input type="checkbox"/> Less than 5 kilos <input type="checkbox"/> 6-15 kilos <input type="checkbox"/> Greater than 15 kilos	
Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>	<input type="checkbox"/> Less than 5 kilos <input type="checkbox"/> 6-15 kilos <input type="checkbox"/> Greater than 15 kilos	
Definitions: Frequently (P) – on average at least every other shift Occasionally (P) – less than every other shift but at least three times per month		
Is the Job Holder expected to stand/sit in a restricted position ² ?		<input type="checkbox"/> Yes <input type="checkbox"/> No
For how long?	<input type="checkbox"/> Up to and including 20 minutes on each occasion	
	<input type="checkbox"/> Greater than 21 minutes on each occasion	
Notes: ¹ For example, lifting, pushing, pulling, bending, kneeling, crawling, walking more than 1 kilometre (ie 0.62 mile or 1093 yards) at any one time, restraint of patients, moving patients, heavy manual digging. ² Keyboard input, wearing a telephone headset, driving, sitting at a microscope. ³ For example, where the post holder is required to change from one activity to another at third party request.		
Mental Effort:		
Is the Job Holder expected to perform duties of an unpredictable nature ³ ?		<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If Yes, please give examples on a separate sheet of paper and attach to this form.</i>		
Is the job holder expected to be particularly alert for cumulative periods?		<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes:	1-2 hours at a time <input type="checkbox"/>	Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>
	Continuously for more than half a shift <input type="checkbox"/>	Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>
	Is there a requirement for in-depth mental attention combined with proactive engagement whilst carrying out clinical interventions <input type="checkbox"/>	Frequently <input type="checkbox"/> Occasionally <input type="checkbox"/>
	Definitions: Frequently (M) – occurs on half the shifts or more Occasionally (M) – fewer than half the shifts worked	

Emotional Effort:			
Does the Job Holder deal with distressing or emotional circumstances/ information, directly or indirectly?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
How often?	<input type="checkbox"/> F = Frequently – on average once a week or more		
	<input type="checkbox"/> O = Occasionally – once a month or more on average		
	<input type="checkbox"/> R = Rarely – less than once a month on average		
Does the Job Holder have exposure to:	F, O or R	Direct exposure	Indirect exposure
Care of terminally ill		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dealing with difficult family situations/circumstances		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Imparting unwelcome news to staff/patients/service users/relatives		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
• grievances, disciplinaries		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
• redeployment or redundancy		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
• news of terminal illness		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
• severely injured bodies/corps		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Personal involvement with child abuse or family breakdown		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dealing with people with severely challenging behaviour		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dealing with patients/relatives as a result of a serious incident		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the post holder read case notes/type reports of any of the above: If so which of the above:		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Working Conditions:		
Does the Job Holder work in unpleasant working conditions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	Exposure	Frequency
Required to sit at a VDU more or less continuously		
Travel by road		
Work outdoors		
Exposure to dirt, dust, smell, noise or in the vicinity of: body fluids, foul linen, fleas, lice, noxious fumes		
Work directly with uncontained body fluids, foul linen, fleas, lice, noxious fumes		
Definition:	<input type="checkbox"/> DE = Direct exposure	
How?	<input type="checkbox"/> ID = Indirect exposure	
Definition:	<input type="checkbox"/> F = Frequently – several times a week and most shifts	
How often?	<input type="checkbox"/> O = Occasionally – three times a month on average	
	<input type="checkbox"/> R = Rarely – less than three times a month on average	

APPLICATION FOR MATCHING OF A NEW POST

MANAGERS DETAILS	
NAME OF LINE MANAGER:	
JOB TITLE:	
DEPARTMENT:	
ADDRESS:	
TELEPHONE NO:	
EMAIL:	

DETAILS OF POST TO BE MATCHED	
JOB TITLE OF POST TO BE MATCHED:	

I attach a copy of the:

- Job Description & Person Specification Combined
- Organisation Chart (included within Job description/person specification document)

Please ensure all of the below information is completed to avoid any delay:

Manager's Signature: **Date:**

Print Name:

Director/ADO's Signature: **Date:**

Print Name:

***If approved, completed and signed form should be forwarded to
tsdft.agendaforchange@nhs.net
 The AfC team will notify you electronically of receipt.***

APPLICATION FOR RE-MATCHING OF AN EXISTING POST

POSTHOLDER DETAILS	
POSTHOLDER'S NAME:	
CURRENT JOB TITLE:	
CURRENT BAND:	
EXISTING POST AfC JOB REF NO*:	
DEPARTMENT:	
ADDRESS:	
TELEPHONE NO:	
EMAIL:	
MANAGERS DETAILS	
NAME OF LINE MANAGER:	
JOB TITLE:	
DEPARTMENT:	
ADDRESS:	
TELEPHONE NO:	
EMAIL:	
DETAILS OF POST TO BE REMATCHED	
JOB TITLE OF POST TO BE MATCHED:	
EFFECTIVE START DATE OF POST <i>(Date must be within six months of submission date):</i>	
REASON FOR RE-EVALUATION: <i>Outline below the rationale for the re-evaluation request.</i>	
ESTABLISHMENT CONTROL FORM D REFERENCE NUMBER: <small>Link to ECF form (Form D) - Establishment Control Form D</small>	

**If it is an existing post which has previously been allocated a band please provide the job reference number.*

I attach a copy of the revised:

- Job Description/Person Specification Combined
- Organisation Chart (included within JD/PS document)

Please ensure all of the below information is completed to avoid any delay:

Postholder's Signature: **Date:**

Print Name:

Manager's Signature: **Date:**

Print Name:

Director/ADO's Signature: **Date:**

Print Name:

If approved, completed and signed form should be forwarded to:

tsdf.agendaforchange@nhs.net

The AfC team will notify you electronically of receipt.

APPLICATION FOR BAND OUTCOME REVIEW

POSTHOLDER DETAILS (IF APPLICABLE)	
POSTHOLDER'S NAME:	
CURRENT JOB TITLE:	
CURRENT BAND:	
DEPARTMENT:	
TELEPHONE NO:	
EMAIL:	
DETAILS OF POST TO BE REVIEWED	
JOB TITLE:	
JOB MATCHING REPORT REF:	
IF REQUESTING REVIEW AGAINST A DIFFERENT NATIONAL JOB PROFILE <i>Please attach copy of profile</i>	
PROFILE TITLE:	
BAND:	
MANAGERS DETAILS	
NAME OF LINE MANAGER:	
JOB TITLE:	
DEPARTMENT:	
TELEPHONE NO:	
EMAIL:	

Where appropriate attach the national profile which you consider more closely reflects your role as identified above. The national profiles are available on the following website <http://www.nhsemployers.org/your-workforce/pay-and-reward/pay/job-evaluation/national-job-profiles>

Support your request with evidence to reflect the specific related skills and job requirements and clearly reference this against your job description which should also be attached.

I attach a copy of the:

- Job Description and Job Specification
- Job Profile (*Where appropriate*)

Please indicate which factor(s) you disagree with and provide information to substantiate this:

RELEVANT JOB INFORMATION	
1. Communication & Relationship skills Do you agree with the matched job report? YES/NO If NO then please indicate why.	
2. Knowledge, Training & Experience Do you agree with the matched job report? YES/NO If NO then please indicate why.	
3. Analytical & Judgements Do you agree with the matched job report? YES/NO If NO then please indicate why.	
4. Planning & Organisation Do you agree with the matched job report? YES/NO If NO then please indicate why.	
5. Physical Skills Do you agree with the matched job report? YES/NO If NO then please indicate why.	
6. Responsibility for Patient/Client Care Do you agree with the matched job report? YES/NO If NO then please indicate why.	

RELEVANT JOB INFORMATION	
7. Responsibility for Policy/Service Development Do you agree with the matched job report? YES/NO If NO then please indicate why.	
8. Responsibility for Financial & Physical Resources Do you agree with the matched job report? YES/NO If NO then please indicate why.	
9. Responsibility for Human Resources Do you agree with the matched job report? YES/NO If NO then please indicate why.	
10. Responsibility for Information Resources Do you agree with the matched job report? YES/NO If NO then please indicate why.	
11. Responsibility for Research & Development Do you agree with the matched job report? YES/NO If NO then please indicate why.	
12. Freedom to Act Do you agree with the matched job report? YES/NO If NO then please indicate why.	

RELEVANT JOB INFORMATION	
13. Physical Effort Do you agree with the matched job report? YES/NO If NO then please indicate why.	
14. Mental Effort Do you agree with the matched job report? YES/NO If NO then please indicate why.	
15. Emotional Effort Do you agree with the matched job report? YES/NO If NO then please indicate why.	
16. Working Conditions Do you agree with the matched job report? YES/NO If NO then please indicate why.	

DECLARATION:

I confirm that I wish my post to be reviewed and that the above information be taken into consideration. I understand that the banding for the post can go down as well as up.

Postholder's signature:Name in Print: Date:

I confirm my agreement that this post should be reviewed and that the information on this form is correct.

Line Manager's signature: Name in Print: Date:

Associate Director/Head of Service signature: Name in Print: Date:

Completed form should be forwarded to: AfC Team, tsdft.agendaforchange@nhs.net

The AfC team will notify you electronically of receipt.